

**DECLARATION FOR PATENT APPLICATION**

As a below named inventor, I hereby declare that:

My residence, post office address and citizenship are as stated below next to my name.

I believe I am the original, first and sole inventor (if only one name is listed below) or an original, first and joint inventor (if plural names are listed below) of the subject matter which is claimed and for which a patent is sought on the invention entitled PORTFOLIO MANAGEMENT EVALUATION, the specification of which:

- ☒ is attached hereto.  
☐ was filed on \_\_\_\_\_ as Application Serial No. \_\_\_\_\_.  
☐ and was amended on \_\_\_\_\_ (if applicable).

I hereby state that I have reviewed and understand the contents of the above-identified specification, including the claims, as amended by any amendment referred to above.

I acknowledge the duty to disclose information which is material to the patentability as defined in Title 37, Code of Federal Regulations, § 1.56(a).

I hereby claim foreign priority benefits under 35 U.S.C. § 119(a)-(d) or § 365(b) of any foreign application(s) for patent or inventor's certificate or § 365(a) of any PCT International application which designated at least one country other than the United States, listed below and have also identified below, by checking the box, any foreign application for patent or inventor's certificate, or PCT International application having a filing date before that of the application on which priority is claimed:

Prior Foreign Application(s)

Priority Claimed

☐ Yes ☐ No

\_\_\_\_\_  
(Number) (Country) (Day/Month/Year Filed)

I hereby claim the benefit under 35 U.S.C. § 119(e) of any United States provisional application(s) listed below:

60/498,889 August 29, 2003  
(Application Serial No.) (Filing Date)

I hereby claim the benefit under 35 U.S.C. § 120 of any United States application(s), or § 365(c) of any PCT International application designating the United States, listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in the prior United States or PCT International application in the manner provided by the first paragraph of 35 U.S.C. § 112, I acknowledge the duty to disclose information which is material to patentability as defined in 37 CFR § 1.56 which became available between the filing date of the prior application and the national or PCT International filing date of this application:

\_\_\_\_\_  
(Application Serial No.) (Filing Date) (Status-patented, pending, abandoned)

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application or any patent issued thereon.

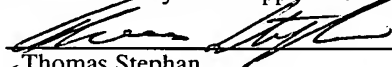
Inventor's Signature

Full name of sole or first inventor

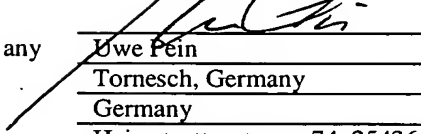
Residence


Citizenship

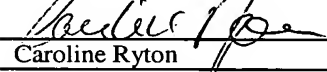
Post Office Address

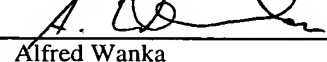
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Thomas Stephan  
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Pinneberger Strasse 203, 22880 Wedel, GERMANY

BRINKS HOFER GILSON & LIONE  
P.O. Box 10395  
Chicago, IL 60610  
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Inventor's Signature  Date: 13/12/2003  
Full name of second joint inventor, if any Uwe Fein  
Residence Tornesch, Germany  
Citizenship Germany  
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Inventor's Signature  Date: \_\_\_\_\_  
Full name of third joint inventor Thomas Ramseier  
Residence Zürich, Switzerland  
Citizenship Switzerland  
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Inventor's Signature  Date: 30/10/2003  
Full name of fourth joint inventor Caroline Rytton  
Residence Zürich, Switzerland  
Citizenship Sweden  
Post Office Address Minervastrasse 29, 8032 Zürich, SWITZERLAND

Inventor's Signature  Date: 7/11/2003  
Full name of fifth joint inventor Alfred Wanka  
Residence Siegen, Germany  
Citizenship Germany  
Post Office Address Tilmann-Stolz-Str. 4, 57074 Siegen, GERMANY

Inventor's Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Full name of sixth joint inventor \_\_\_\_\_  
Residence \_\_\_\_\_  
Citizenship \_\_\_\_\_  
Post Office Address \_\_\_\_\_

Inventor's Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Full name of seventh joint inventor \_\_\_\_\_  
Residence \_\_\_\_\_  
Citizenship \_\_\_\_\_  
Post Office Address \_\_\_\_\_

Inventor(s): Thomas Stephan, Uwe Pein, Thomas Ramseyer, Caroline Ryton, Alfred Wanka Serial No: \_\_\_\_\_

Case No: 10022-398 (Accenture Ref. No. 01524-00/US) Filing Date: \_\_\_\_\_

Title: PORTFOLIO MANAGEMENT EVALUATION

**U.S. POWER OF ATTORNEY  
FOR ACCENTURE GLOBAL SERVICES GmbH**

The undersigned duly authorized representative of Accenture Global Services GmbH (hereinafter "AGS"), a limited liability company organized as a judicial person under the laws of Switzerland, hereby revokes all previously granted powers of attorney in the above-identified patent application and appoints the following attorneys and agents to prosecute this patent application and to transact all business in the United States Patent and Trademark Office connected therewith:

Henry L. Brinks	(17,013)	G. Peter Nichols	(34,401)	Joseph F. Hetz	(41,070)
Richard G. Lione	(19,795)	John C. Freeman	(34,483)	Jason C. White	(42,223)
Raymond W. Green	(24,587)	William F. Prendergast	(34,699)	James L. Katz	(42,711)
John K. Lucas	(27,024)	Michael E. Milz	(34,880)	John F. Nethery	(42,928)
Gary M. Ropski	(28,257)	Robert S. Mallin	(35,596)	David W. Okey	(42,959)
Joel W. Benson	(29,002)	John J. King	(35,918)	James A. Collins	(43,557)
James P. Naughton	(30,665)	Dominic P. Zanfardino	(36,068)	David H. Bluestone	(44,542)
James R. Sobieraj	(30,805)	K. Shannon Mrksich, Ph.D.	(36,675)	Vineet Gauri	(44,701)
Steven P. Shurtz	(31,424)	Michael P. Chu	(37,112)	Vincent J. Gnoffo	(44,714)
Jeffery M. Duncan	(31,609)	John G. Rauch	(37,218)	Charles M. McMahon	(44,926)
Thomas J. Filarski	(31,612)	Kent E. Genin	(37,834)	Richard E. Stanley, Jr.	(45,662)
Glen P. Belvis	(31,735)	Meredith Martin Addy	(37,883)		
Harold V. Johnson	(31,972)	Marc V. Richards	(37,921)		
Gustavo Siller, Jr.	(32,305)	Craig A. Summerfield	(37,947)		
Helen A. Odar	(32,806)	Andrew D. Stover	(38,629)		
Bradley G. Lane	(33,411)	Mark H. Remus	(40,141)		
Jasper W. Dockrey	(33,868)	Susan Reinecke	(40,198)		
Ralph J. Gabric	(34,167)	Amir N. Penn	(40,767)		

Of the firm: **BRINKS HOFER GILSON & LIONE**  
**P.O. Box 10395**  
**Chicago, Illinois 60610**

And: Wayne P. Sobon (32,438)  
John F. Rollins (38,013)  
Steven G. Steger (40,185)  
Michael B. Chernoff (42,408)


Of: **Accenture LLP**  
**1661 Page Mill Road**  
**Palo Alto, California 94304**

Please address all correspondence and telephone calls to Richard E. Stanely, Jr. in care of:

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P.O. Box 10395  
Chicago, IL 60610  
(312) 321-4200

The undersigned duly authorized representative of AGS also authorizes and empowers the Brinks Hofer Gilson & Lione attorneys and agents named above to accept and follow instructions from Wayne P. Sobon, John F. Rollins, Vicki St. John, Steven G. Steger, or Michael B. Chernoff, attorneys of AGS, as to any action to be taken in the United States Patent & Trademark Office regarding this application, without conferring with any other representative of AGS, and to execute a Statement Under 37 CFR 3.73(b) on behalf of AGS to establish its right to take action as an assignee for the above-identified patent application.

☒ **A Statement Under 37 CFR 3.73(b) is attached.**

Signature:   
Name: Wayne P. Sobon  
Title: Manager and Director of Intellectual Property  
Who is duly authorized to sign on behalf of AGS by the attached Corporate Certificate

Signed at: PALO ALTO, CALIFORNIA on this 19th day of January, 2004.

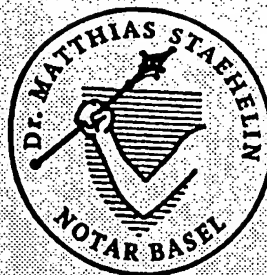
# Corp ration Certificate

I hereby certify that **Accenture Global Services GmbH** of 27 Stadthausgasse, Schaffhausen, Switzerland, is a limited liability company organized as judicial person under the laws of Switzerland and that since January 30 (thirtieth), 2001 (two thousand and one) **Wayne P. Sobon**, citizen of the United States, residing in Palo Alto (CA), is a lawful representative of said judicial person and is authorized to execute any legal document on behalf of said judicial person in particular in all Trademark, Patent and other intellectual property related matters.

Basel, this 30th (thirtieth) of July 2001 (two thousand and one)

*M. Staehelin, Notar*

Dr. Matthias Staehelin, notary public



Allgem. Prot. No. 42/2001

**PATENT APPLICATION STATEMENT UNDER 37 CFR 3.73(b)**

Inventor(s): Thomas Stephen, Uwe Pein, Thomas Ramseyer, Caroline Ryton, Alfred Wanka

Serial No.: \_\_\_\_\_ Case No.: 10022/398 (Accenture Ref. No. 01524-00/US) Filing Date: \_\_\_\_\_

Title: PORTFOLIO MANAGEMENT EVALUATION

Assignee: ACCENTURE GLOBAL SERVICES GmbH,

ACCENTURE GLOBAL SERVICES GmbH is:

1. ☒ the assignee of the entire right, title and interest; or
2. ☐ a co-assignee of an entire and undivided interest;

in the patent application identified above by virtue of either:

☒ inventor assignment(s) recorded in the Patent and Trademark Office at Reel \_\_\_\_\_, Frame \_\_\_\_\_, or for which a copy thereof is attached;

OR

☐ a chain of title from the inventor(s), of the patent application identified above, to the current assignee as shown below:

1. From: \_\_\_\_\_ To: \_\_\_\_\_  
The document was recorded in the Patent and Trademark Office at Reel \_\_\_\_\_, Frame \_\_\_\_\_, or for which a copy thereof is attached.
2. From: \_\_\_\_\_ To: \_\_\_\_\_  
The document was recorded in the Patent and Trademark Office at Reel \_\_\_\_\_, Frame \_\_\_\_\_, or for which a copy thereof is attached.
3. From: \_\_\_\_\_ To: \_\_\_\_\_  
The document was recorded in the Patent and Trademark Office at Reel \_\_\_\_\_, Frame \_\_\_\_\_, or for which a copy thereof is attached.

☐ Citations to additional recorded documents in the chain of title or copies of additional assignments or other pertinent documents are attached.

The undersigned attorney is registered with the United States Patent and Trademark Office and is empowered to sign this Statement on behalf of ACCENTURE GLOBAL SERVICES GmbH.

Attorney for Assignee ACCENTURE GLOBAL SERVICES GmbH

Date

1/19/04

Signature

Wayne P. Sobon

Typed or Printed Name

32,438

Attorney Registration Number